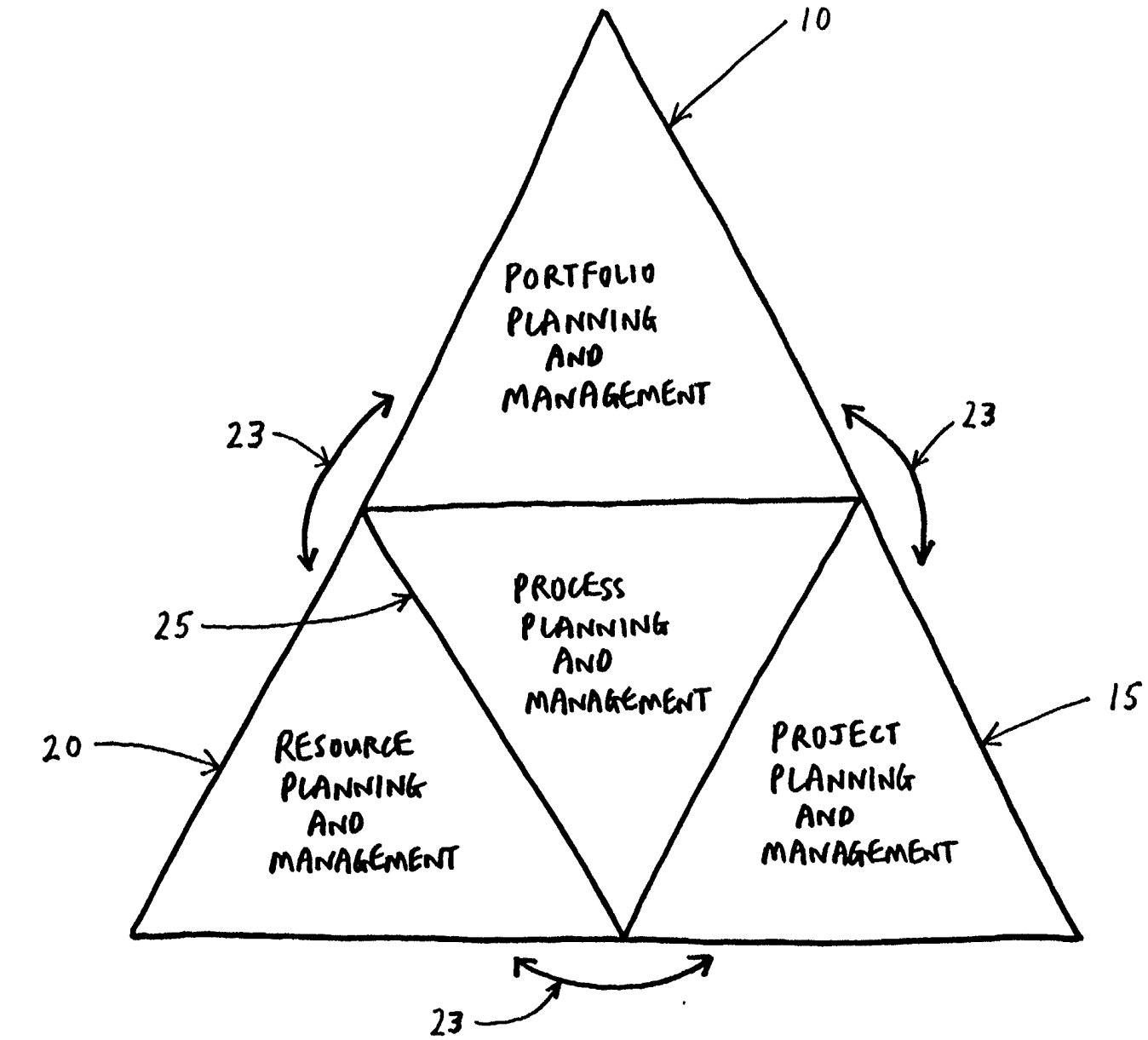

10
PORTFOLIO PLANNING AND MANAGEMENT
23
23
25
PROCESS PLANNING AND MANAGEMENT
20
RESOURCE PLANNING AND MANAGEMENT
15
PROJECT PLANNING AND MANAGEMENT
23
5

FIG. 1

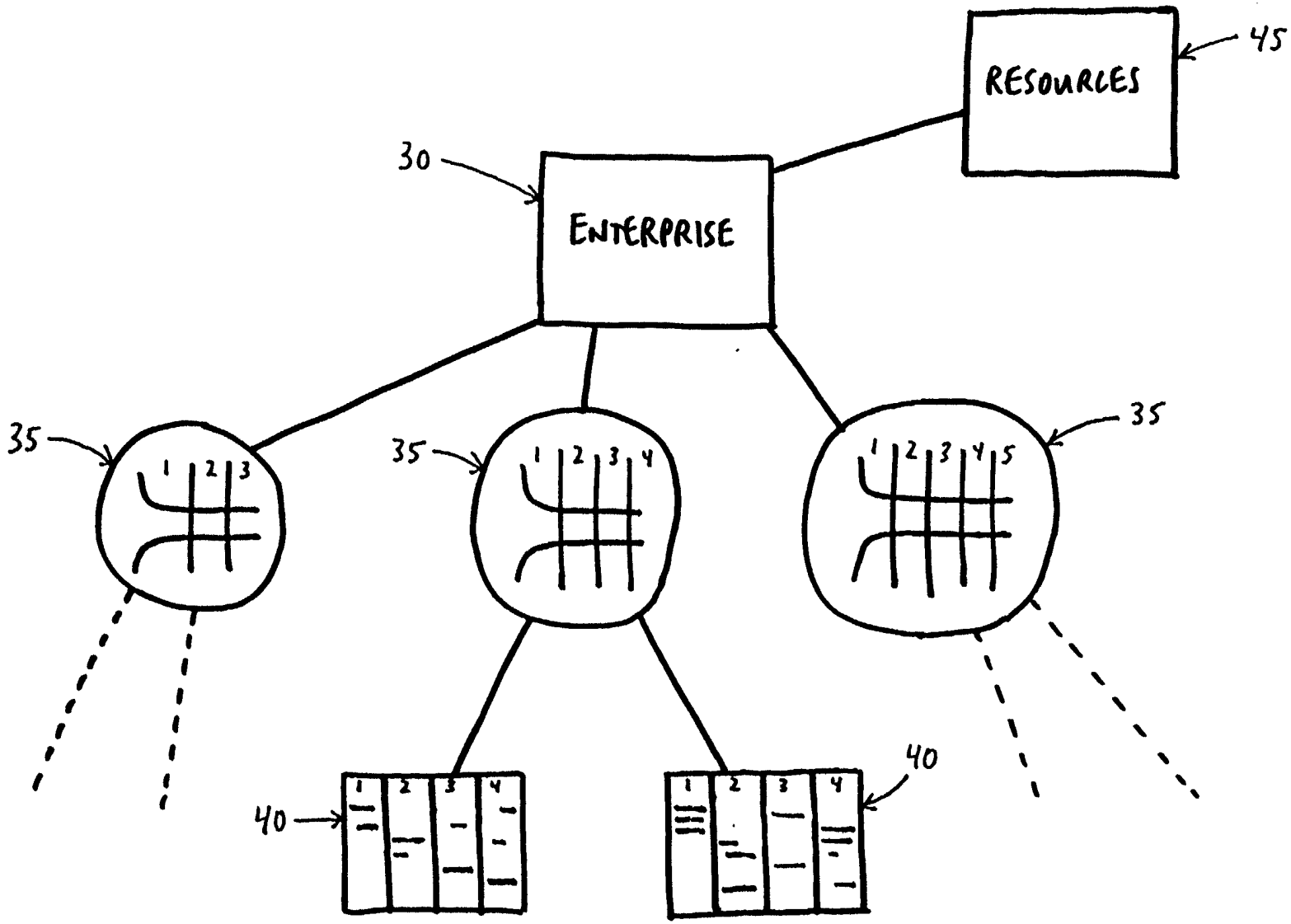


FIG. 2

FD2290 - 5566860

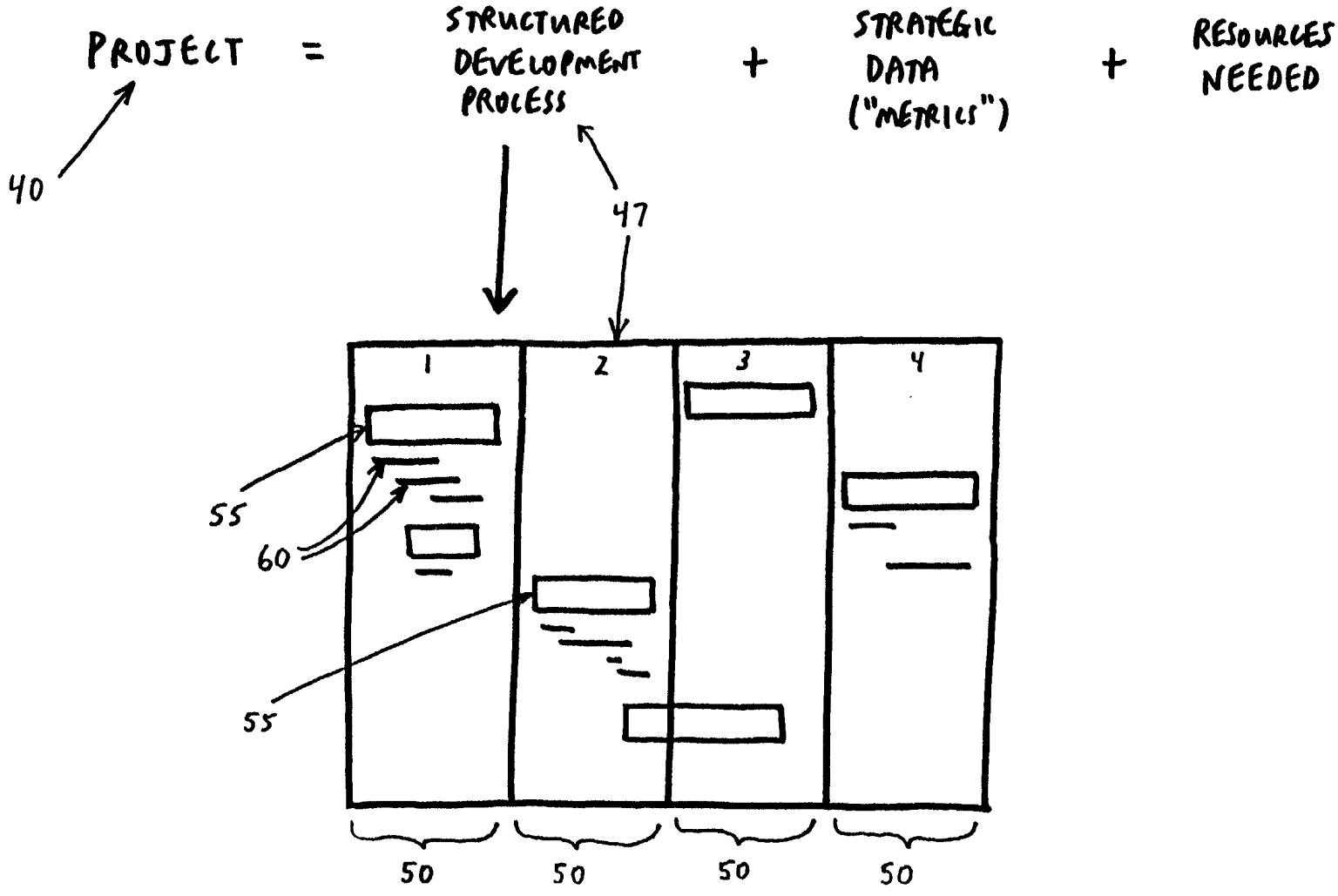


FIG. 3

TO2250 95E88860

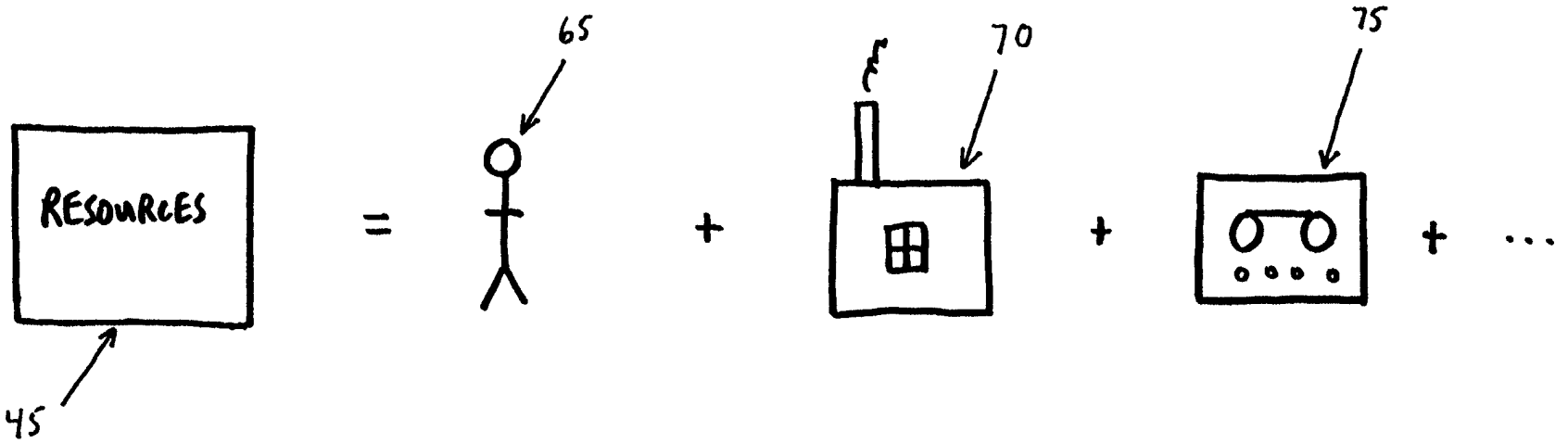


FIG. 4

T02290 "SSE88860

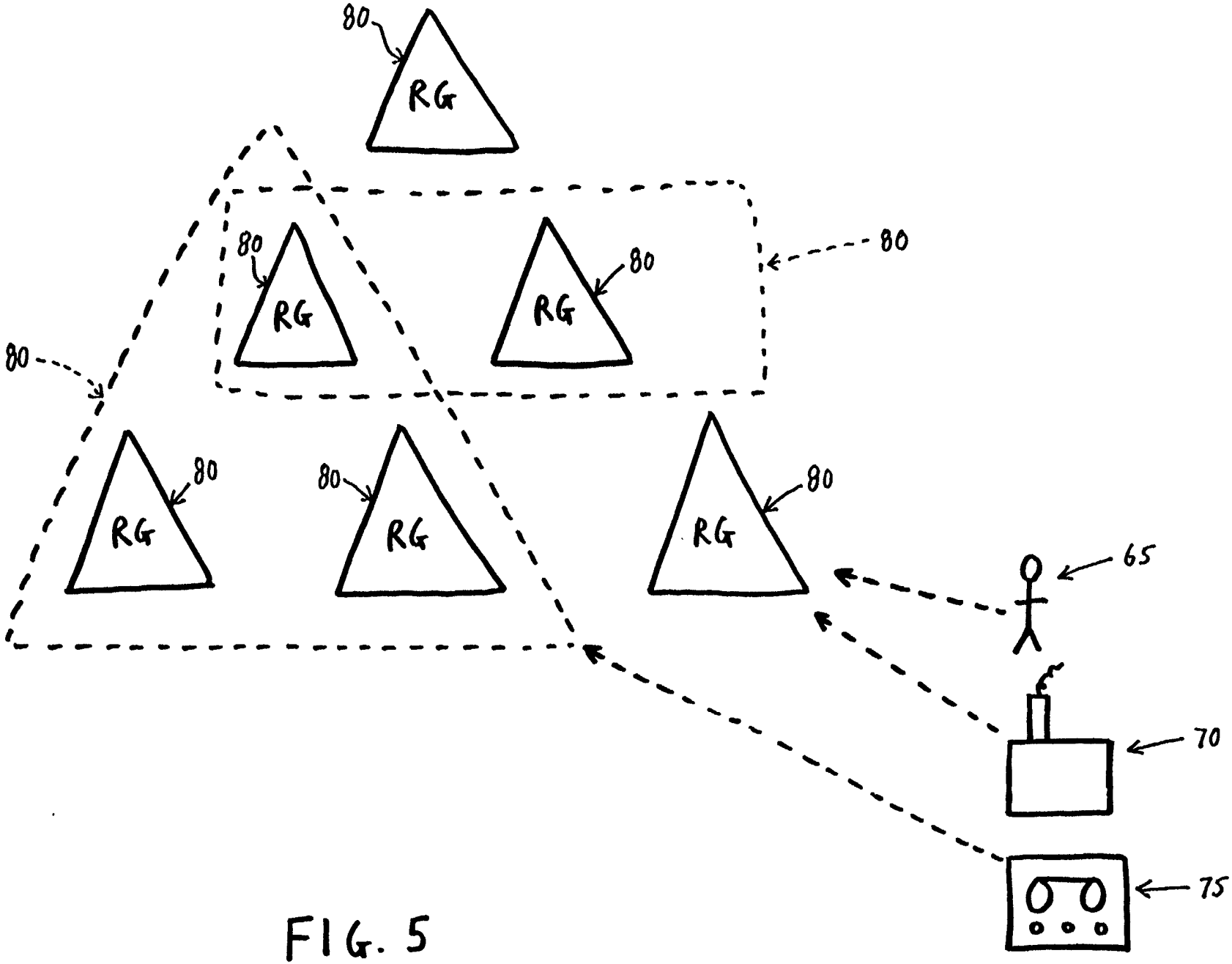


FIG. 5

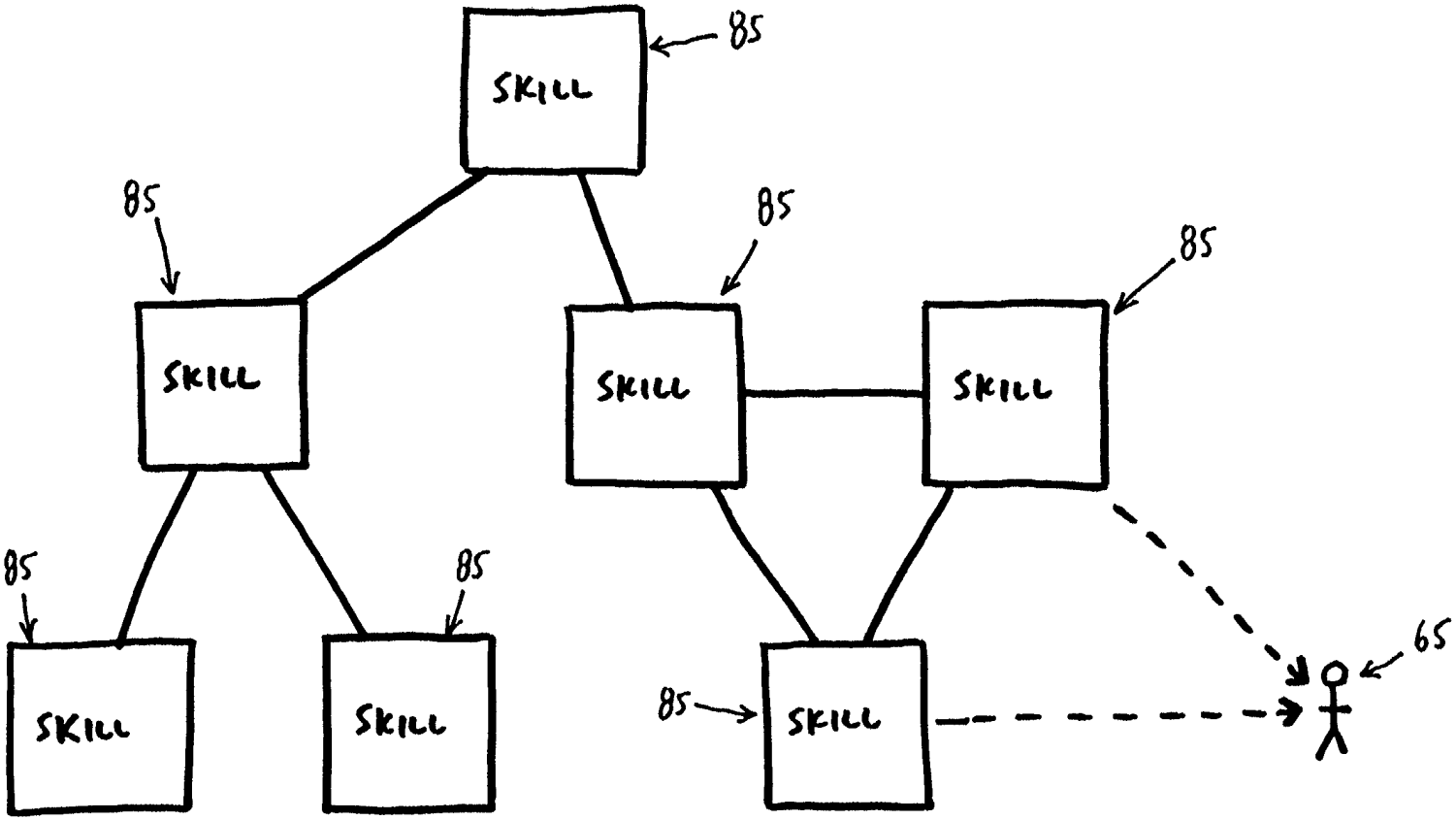

SKILL
85
SKILL
85
SKILL
85
SKILL
85
SKILL
85
SKILL
85
SKILL
85
65

FIG. 6

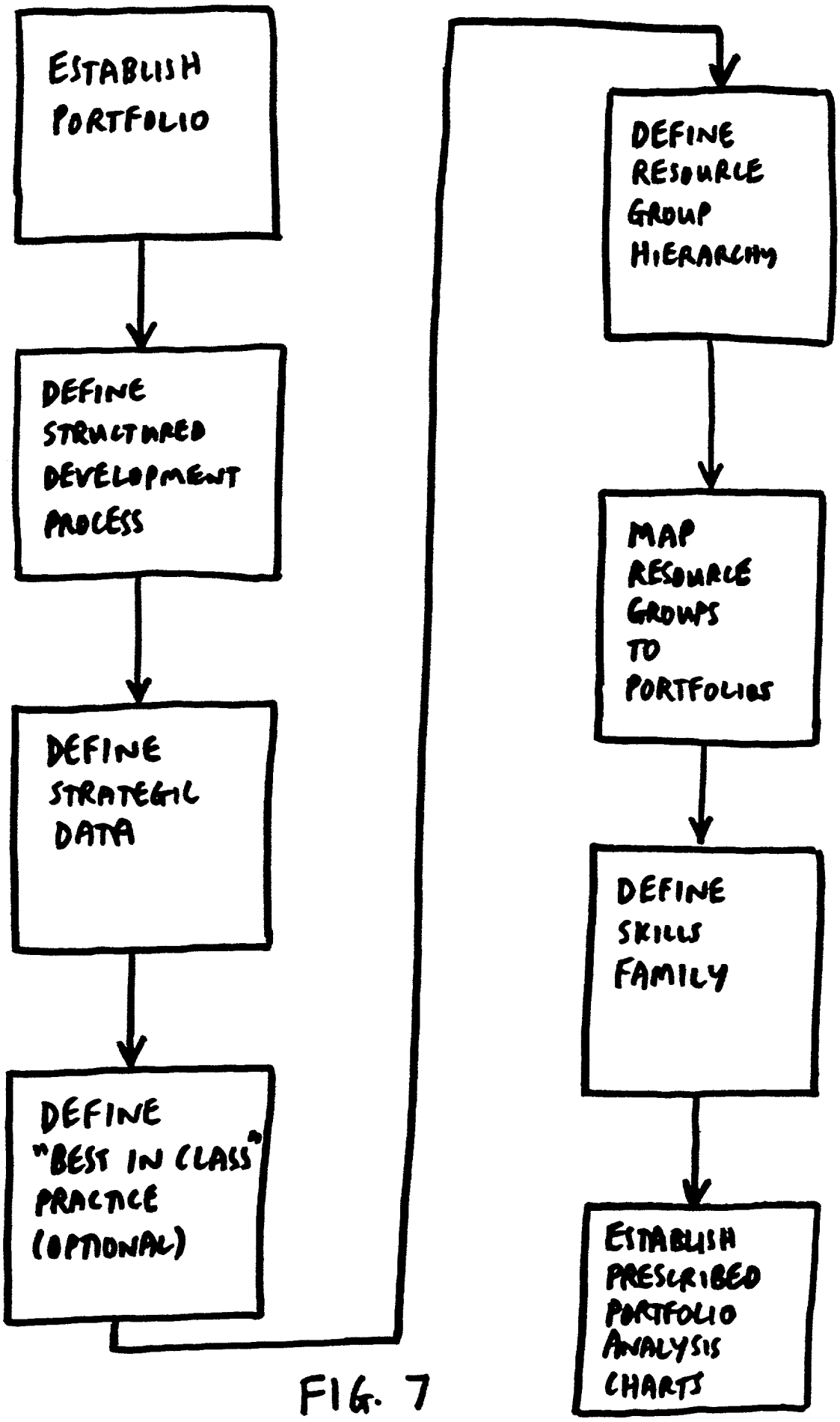

ESTABLISH PORTFOLIO
DEFINE STRUCTURED DEVELOPMENT PROCESS
DEFINE STRATEGIC DATA
DEFINE "BEST IN CLASS" PRACTICE (OPTIONAL)
DEFINE RESOURCE GROUP HIERARCHY
MAP RESOURCE GROUPS TO PORTFOLIOS
DEFINE SKILLS FAMILY
ESTABLISH PRESCRIBED PORTFOLIO ANALYSIS CHARTS

FIG. 7

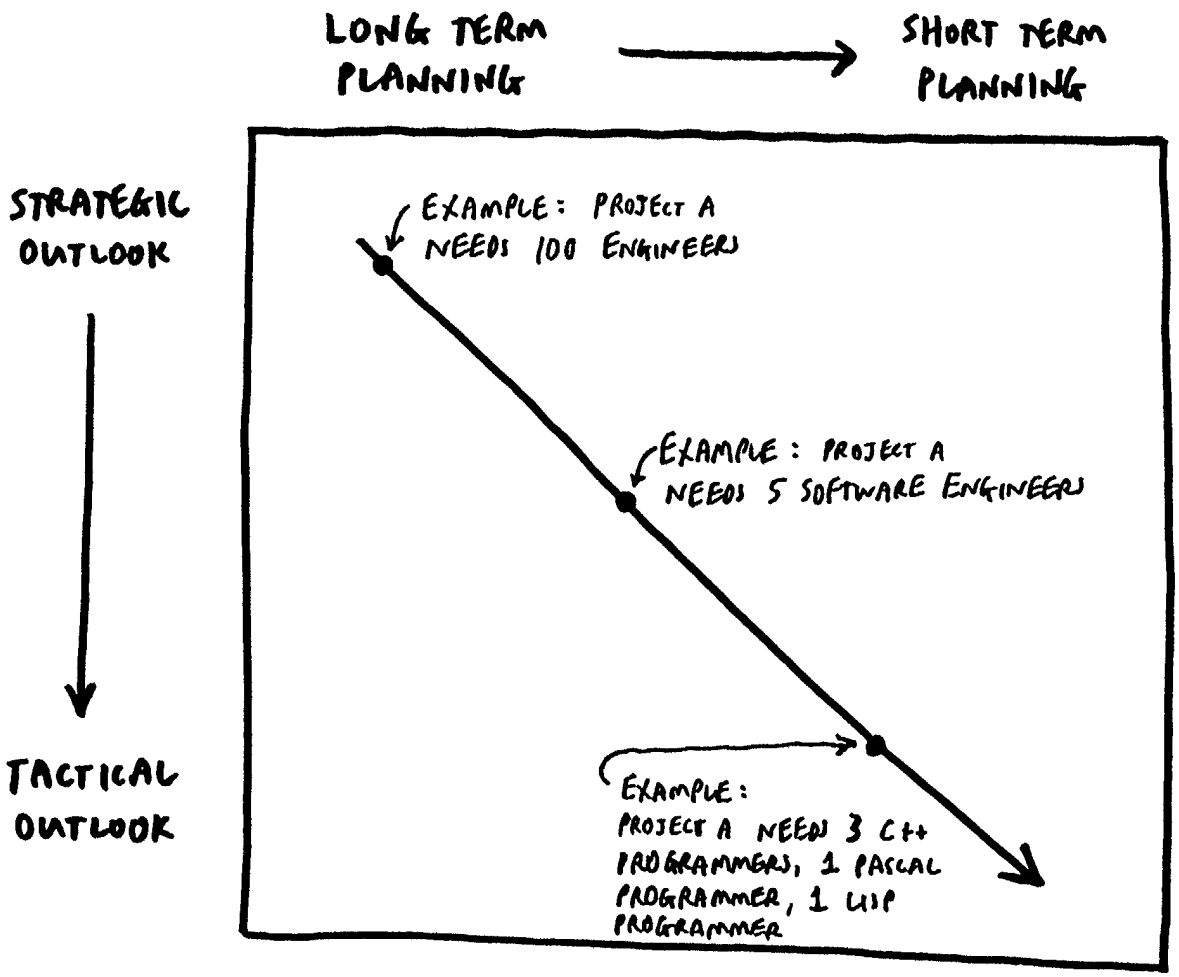

LONG TERM PLANNING
SHORT TERM PLANNING
STRATEGIC OUTLOOK
TACTICAL OUTLOOK
EXAMPLE: PROJECT A NEEDS 100 ENGINEERS
EXAMPLE: PROJECT A NEEDS 5 SOFTWARE ENGINEERS
EXAMPLE: PROJECT A NEEDS 3 C++ PROGRAMMERS, 1 PASCAL PROGRAMMER, 1 LISP PROGRAMMER

FIG. 8

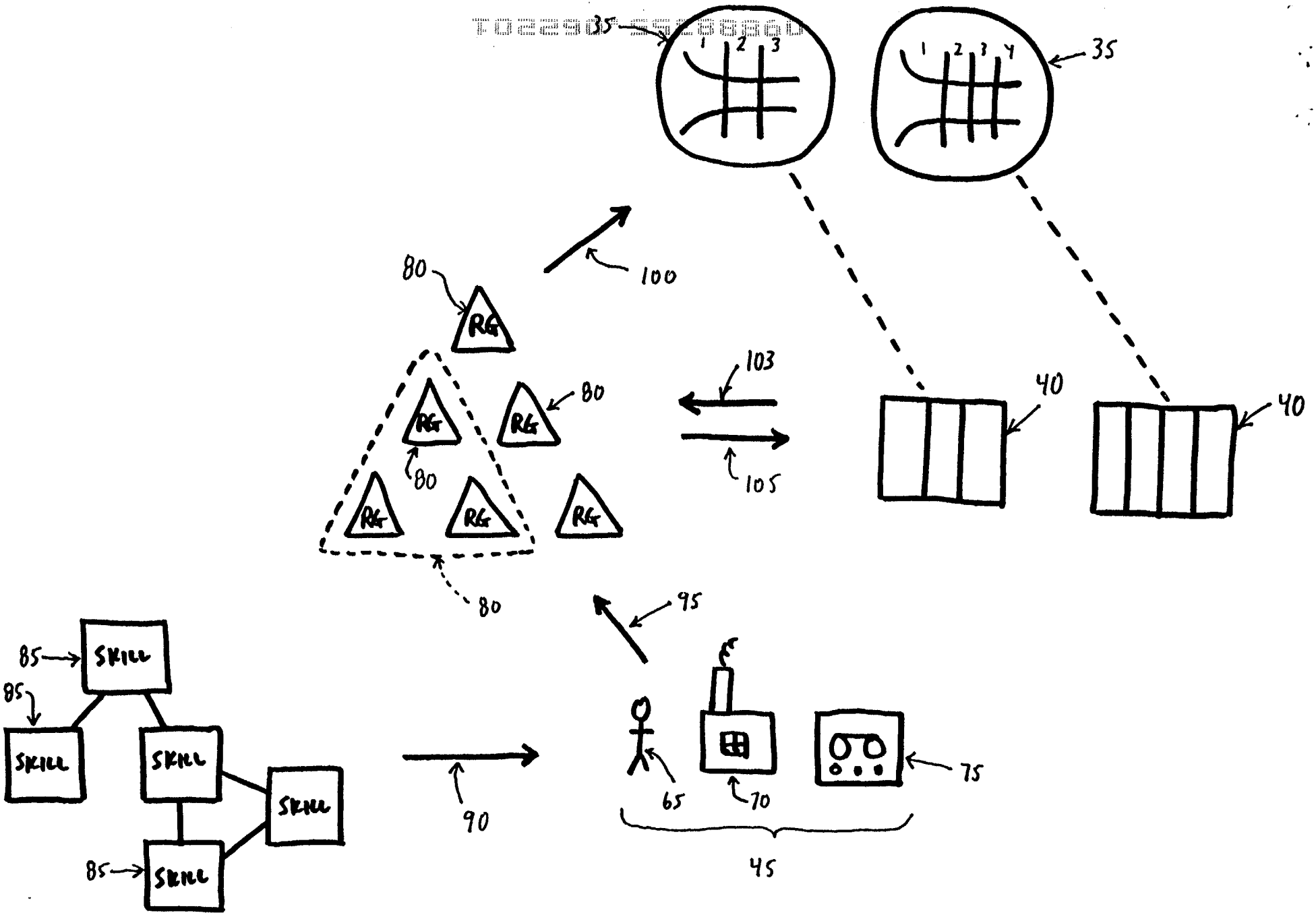
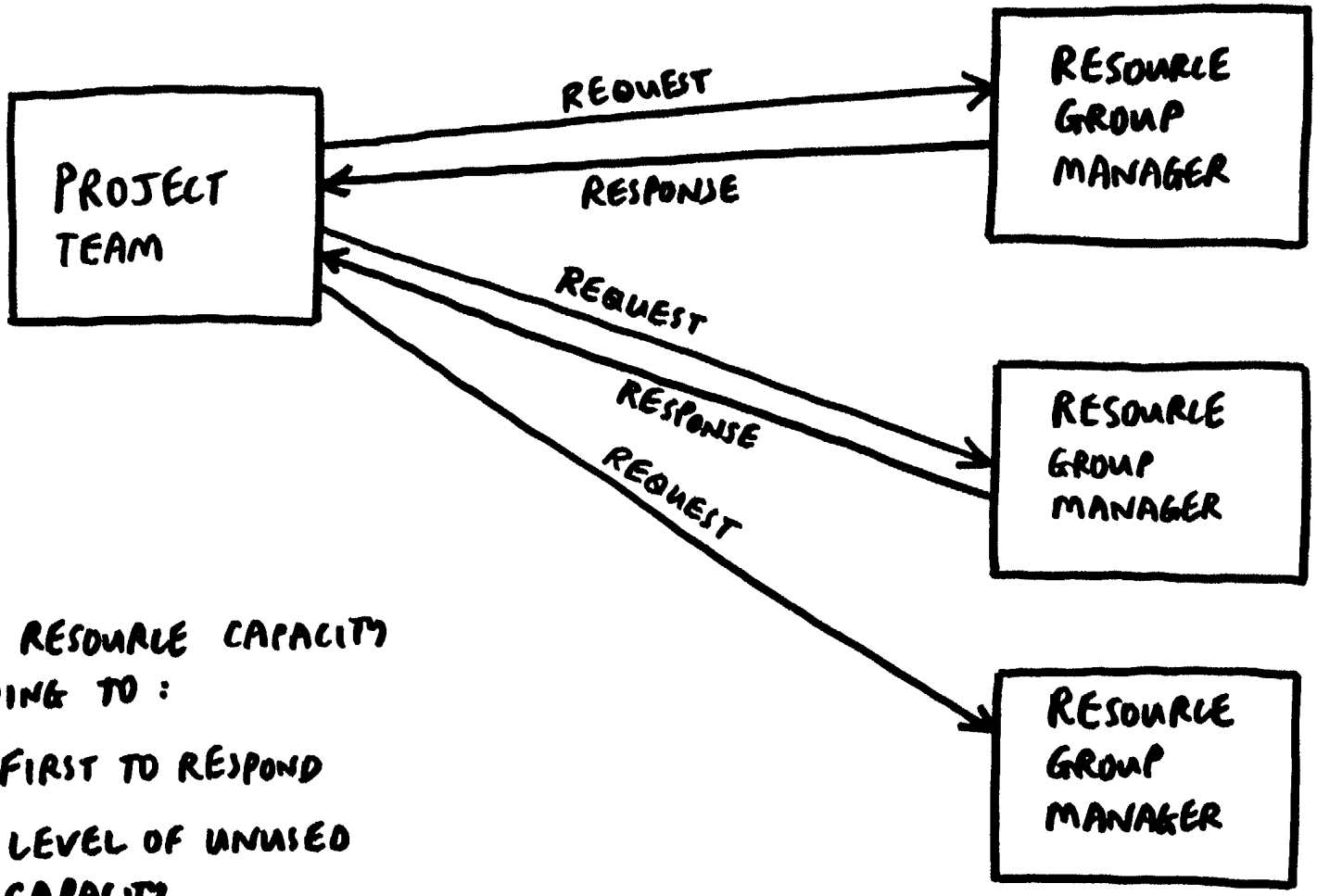

35
1
2
3
1
2
3
4
35
100
80
RG
80
RG
RG
RG
80
80
103
105
40
40
95
85
SKILL
85
SKILL
SKILL
SKILL
85
SKILL
90
65
70
75
45

FIG. 9



ASSIGN RESOURCE CAPACITY ACCORDING TO :

1. FIRST TO RESPOND
2. LEVEL OF UNUSED CAPACITY
3. ...

FIG. 9A

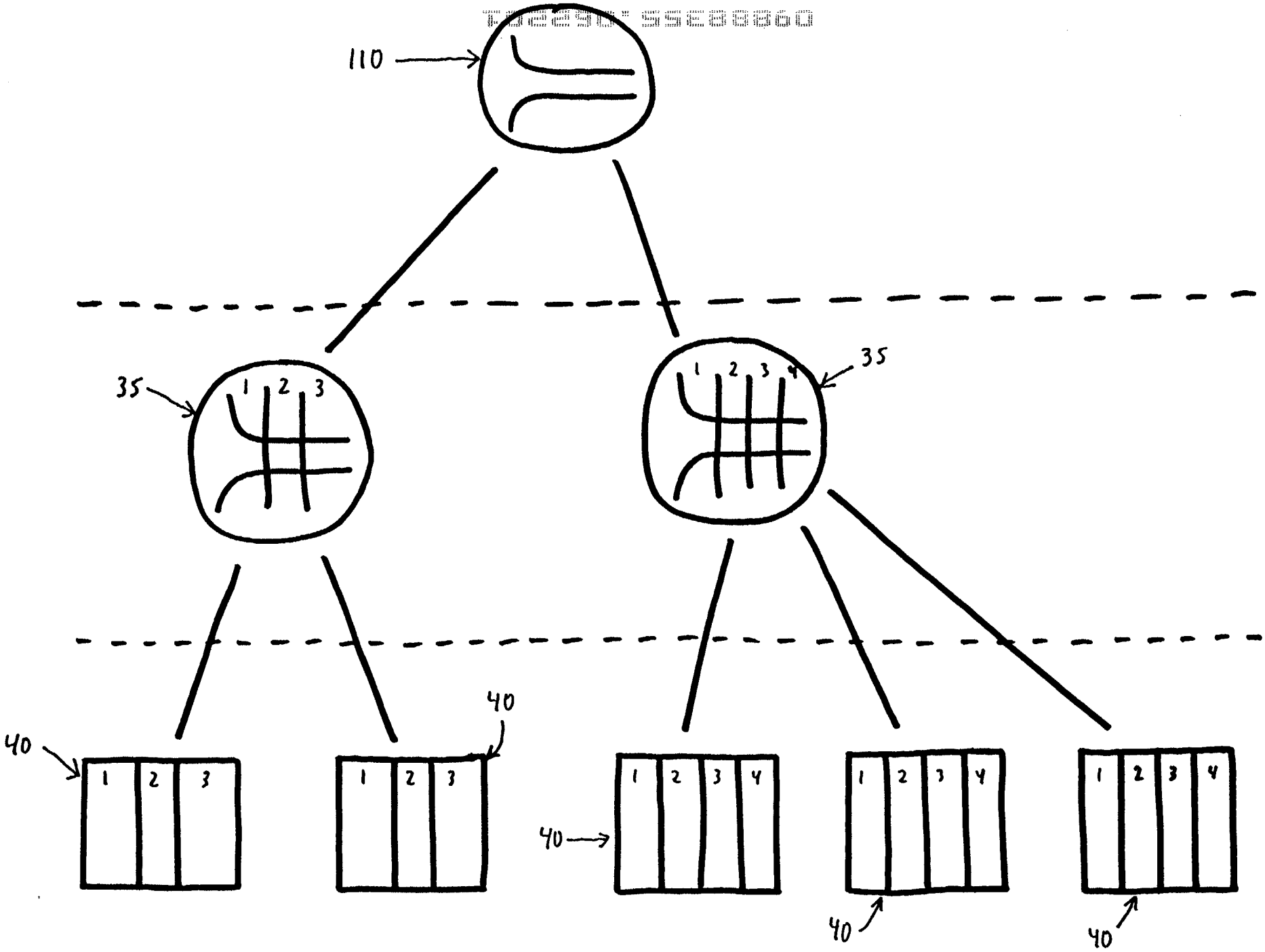


FIG. 10

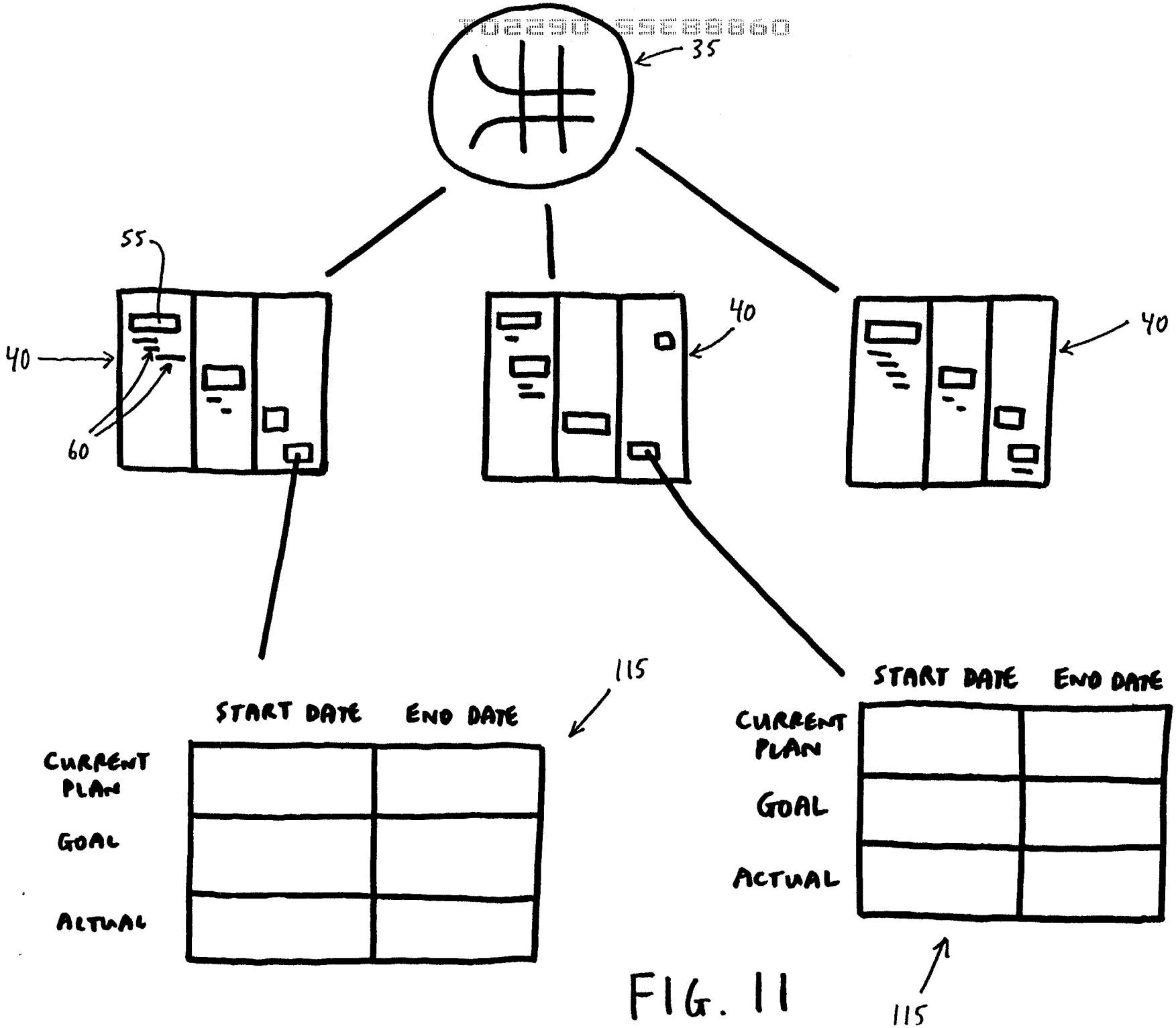
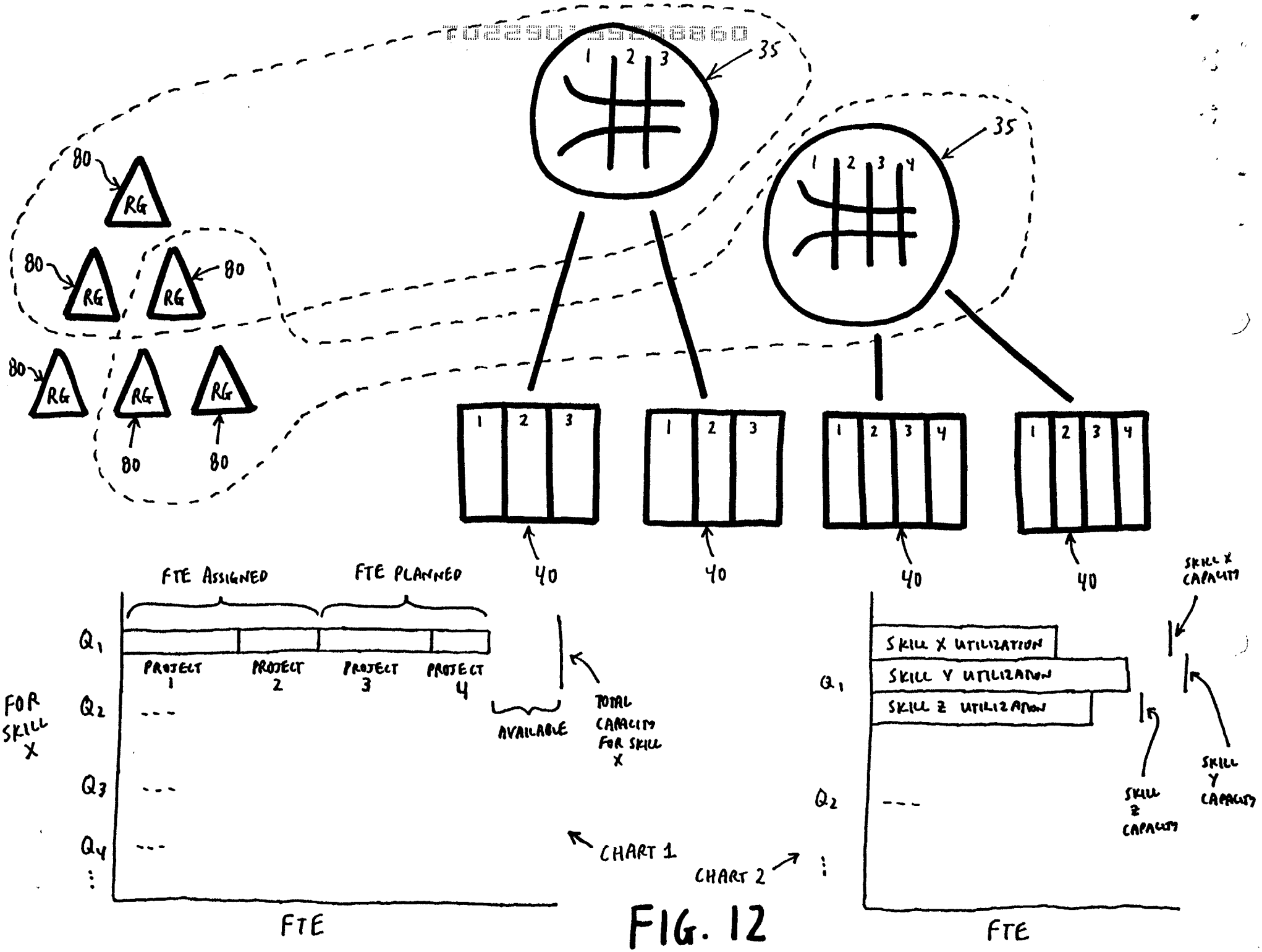

35
55
40
60
40
40
115
START DATE
END DATE
CURRENT PLAN
GOAL
ACTUAL
START DATE
END DATE
CURRENT PLAN
GOAL
ACTUAL
115

FIG. 11


35
1 2 3
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1 2 3 4
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RG
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RG
RG
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80
RG
RG
RG
80
80
1 2 3
1 2 3
1 2 3 4
1 2 3 4
40
40
40
40
FTE ASSIGNED
FTE PLANNED
Q1
Q2
Q3
Q4
PROJECT 1
PROJECT 2
PROJECT 3
PROJECT 4
FOR SKILL X
AVAILABLE
TOTAL CAPACITY FOR SKILL X
FTE
CHART 1
SKILL X UTILIZATION
SKILL Y UTILIZATION
SKILL Z UTILIZATION
SKILL X CAPACITY
SKILL Y CAPACITY
SKILL Z CAPACITY
CHART 2
FTE

FIG. 12

IDresources™ Capacity Calculations, General Principles

- In general, Total Capacity over a time period [$C_T(t)$] is calculated as the sum of the parts contributing capacity to the whole over the time period
- In general, Used Capacity over a time period [$C_U(t)$] is calculated as the sum of the assignments (both to named resources and unspecified resources) consuming capacity from the whole over the time period
- In general, Available Capacity (in #FTE) over a time period [$C_A(t)$] is the Total Capacity minus the Used Capacity [$C_U(t)$]

$C_A(t) = C_T(t) - C_U(t)$ (units are #FTE)

To expresses as % available: $(C_A(t) / C_T(t)) * 100$

To expresses as % used: $(C_U(t) / C_T(t)) * 100$

Important Usage Note: When showing resource needs and an available capacity indicator on the same chart, be certain to add back into the available capacity the amount of any assignment (or portion thereof) in the specified time period that is shown simultaneously as a need

$C_T(t)$ is Total Capacity over the time period t

$C_U(t)$ is Used Capacity over the time period t

$C_A(t)$ is Available Capacity over the time period t

FIG. 13